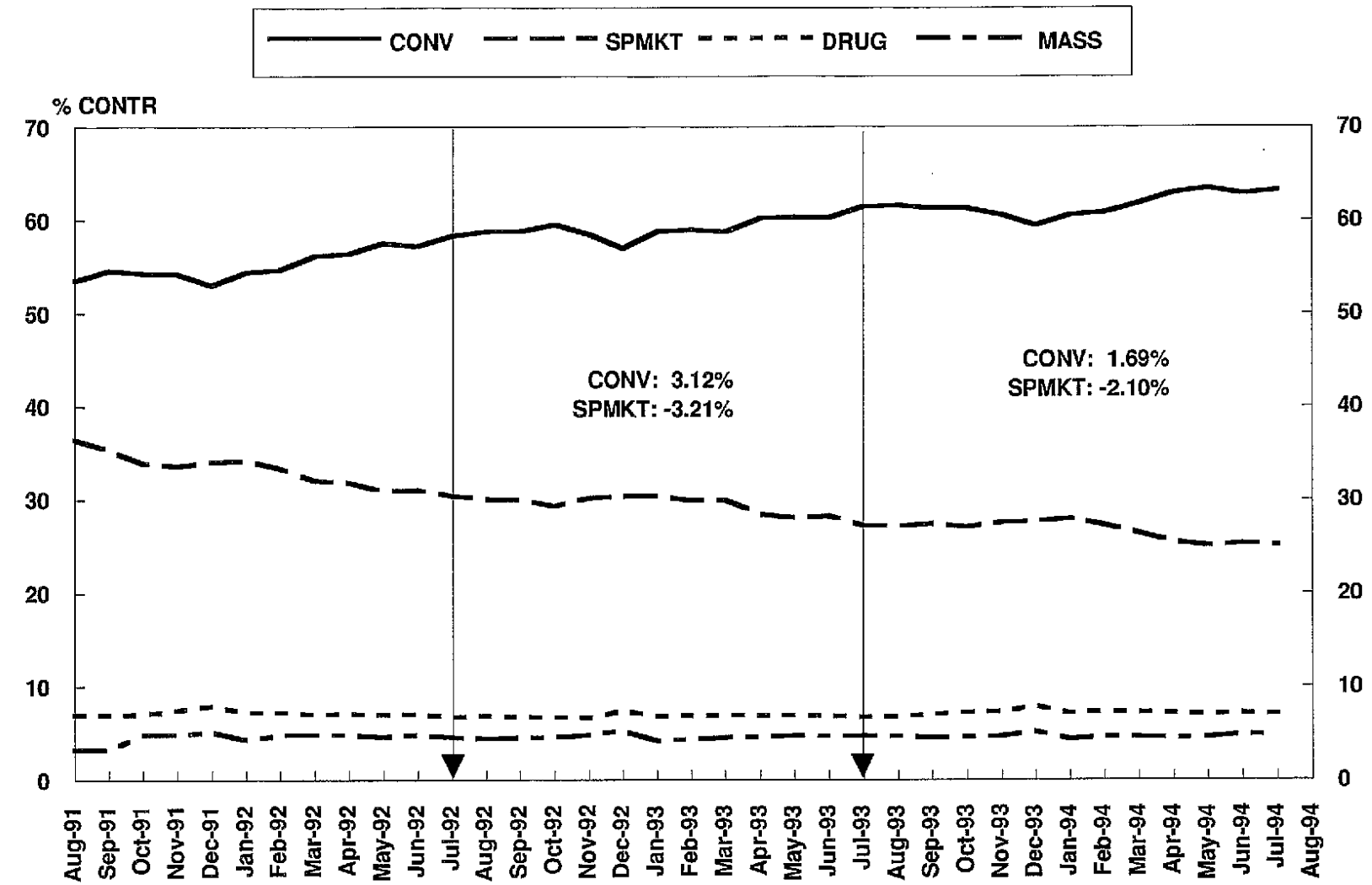
TRADE CLASS SHIFTING

% VOLUME CONTRIBUTION TO U.S. BY TRADE CLASS



SOURCE: INTEGRATED NIELSEN

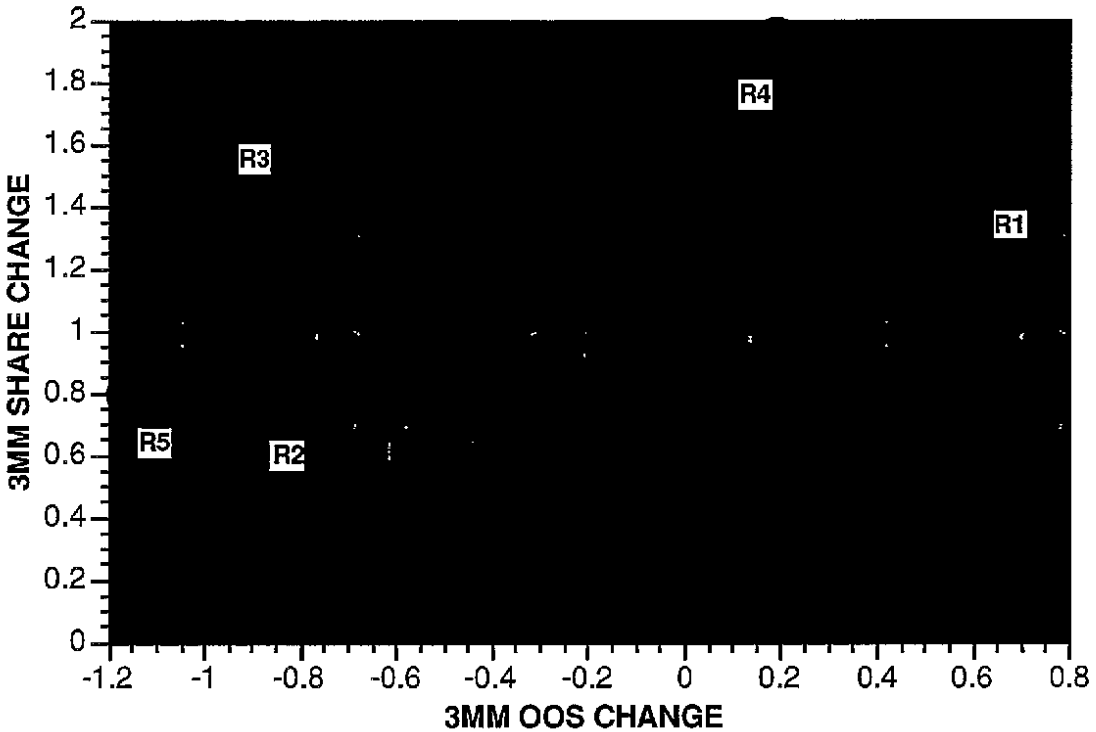
TCIND_SHIFT.CHT

2073610350

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

Marlboro share change vs. out of stock change.

TOTAL MARLBORO SHARE CHANGE VS OOS CHANGE BY C-STORE REGION



SOURCE: INTEGRATED NIELSEN - 3MM JULY 1994 VS 3MTH AGO

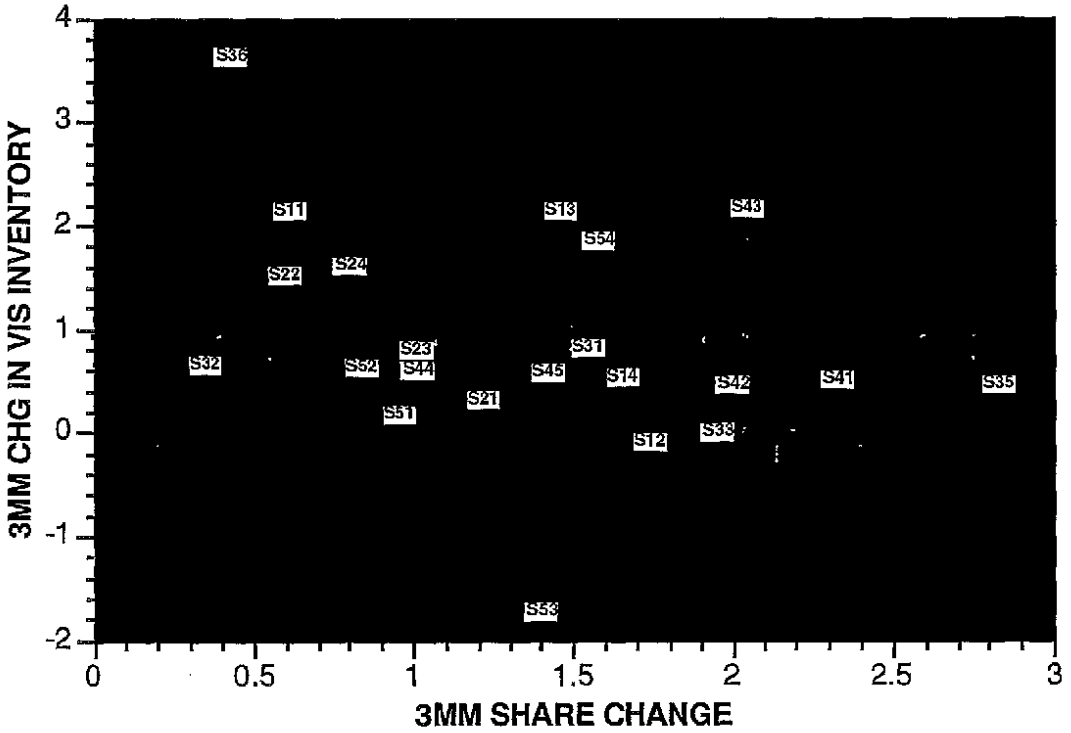
Disk: C-STR_BUB.DLT-2/RKH

2073610351

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

Marlboro share change vs. visual inventory change.

TOTAL MARLBORO
CHG IN VISUAL INV VS SHARE CHANGE
BY C-STORE SECTION



SOURCE: INTEGRATED NIELSEN - 3MM JULY 1994 VS 3MTH AGO

Disk:

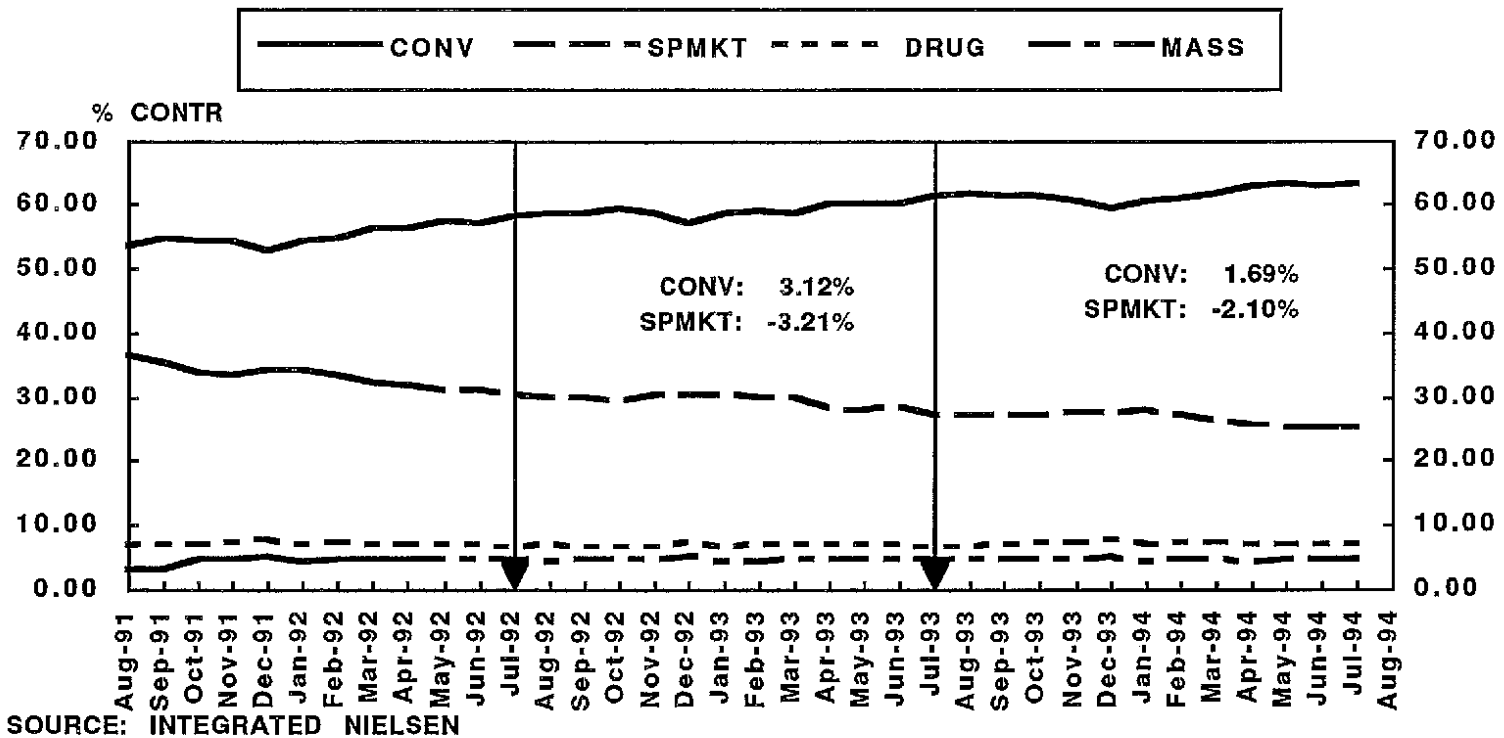
C-STR_BUB.DLT-1/RKH

2073610352

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

Trade class shifting is still evident for the industry.

TRADE CLASS SHIFTING
% VOLUME CONTRIBUTION TO U.S.
BY TRADE CLASS



SOURCE: INTEGRATED NIELSEN

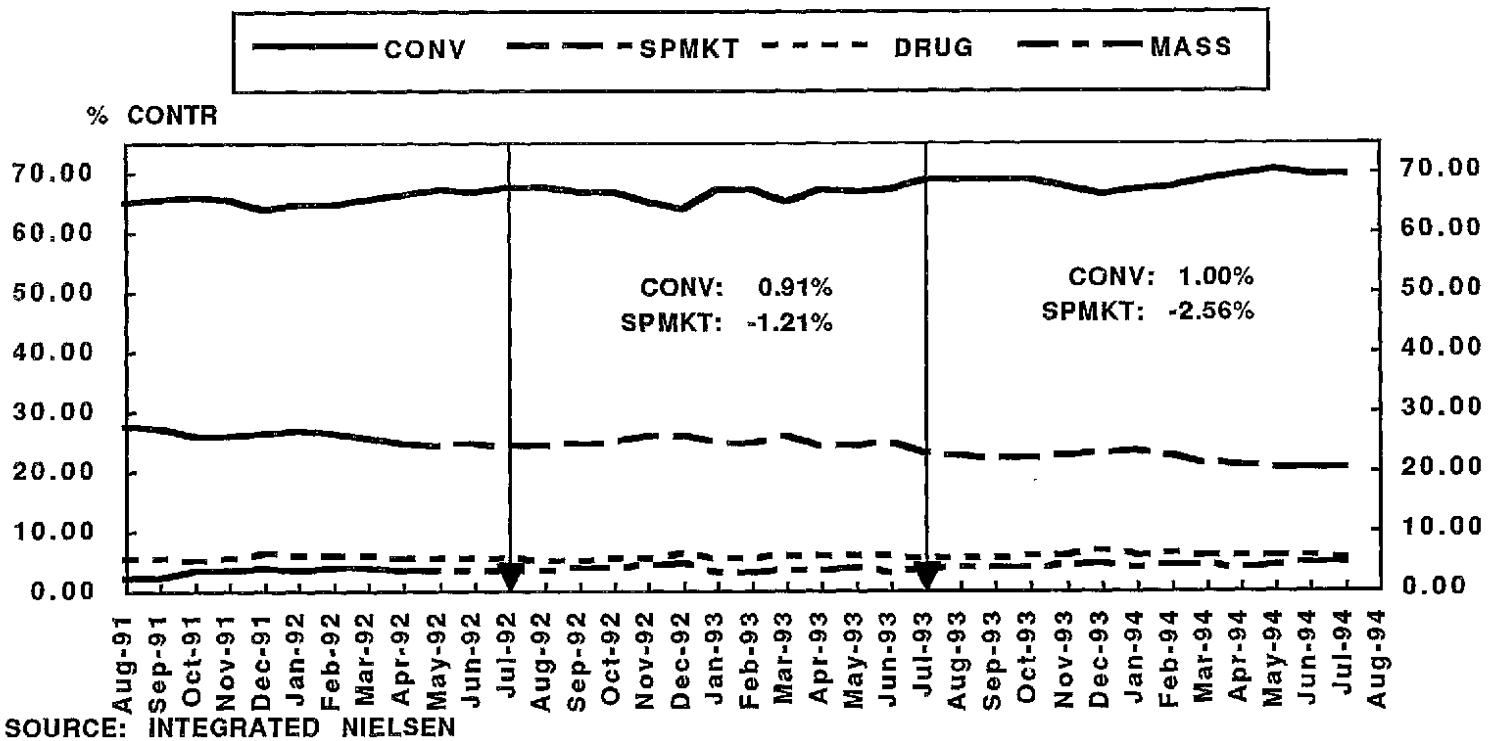
Disk: TCIND_SHIFT.CHT/RKH

2073610353

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

The shift to pack outlets is even more pronounced for Marlboro.

MARLBORO TRADE CLASS SHIFTING
% VOLUME CONTRIBUTION TO U.S. BY TRADE CLASS



SOURCE: INTEGRATED NIELSEN

Disk:

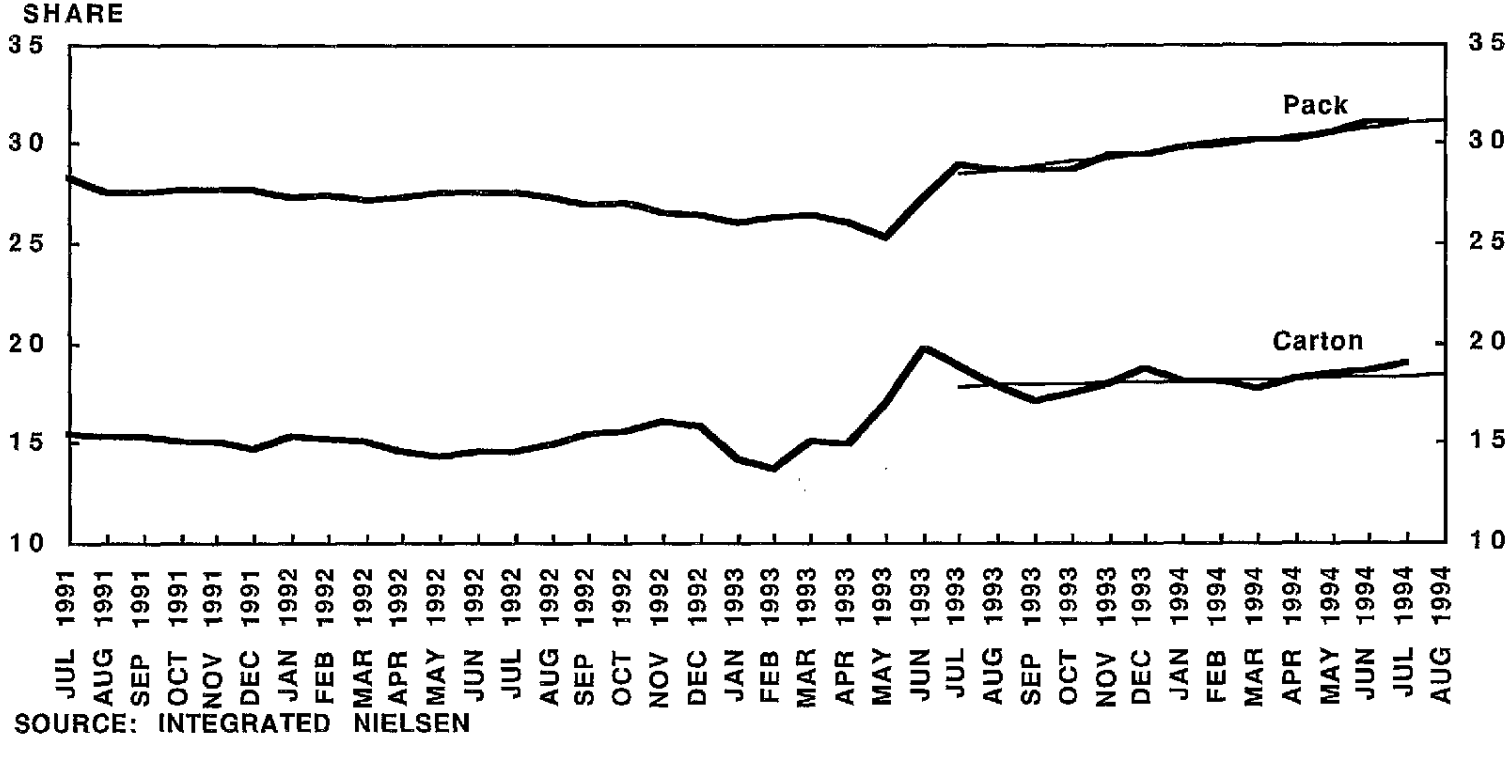
2073610354

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

MARLBORO'S SHARE OF PACK VOLUME CONTINUES TO INCREASE, WHILE CARTON SHARE REMAINS FAIRLY FLAT.

TOTAL MARLBORO
CARTON SHARE VS PACK SHARE
TOTAL SUPERMARKETS



SOURCE: INTEGRATED NIELSEN

MRL_PK/CTSUP.CHT/RKH

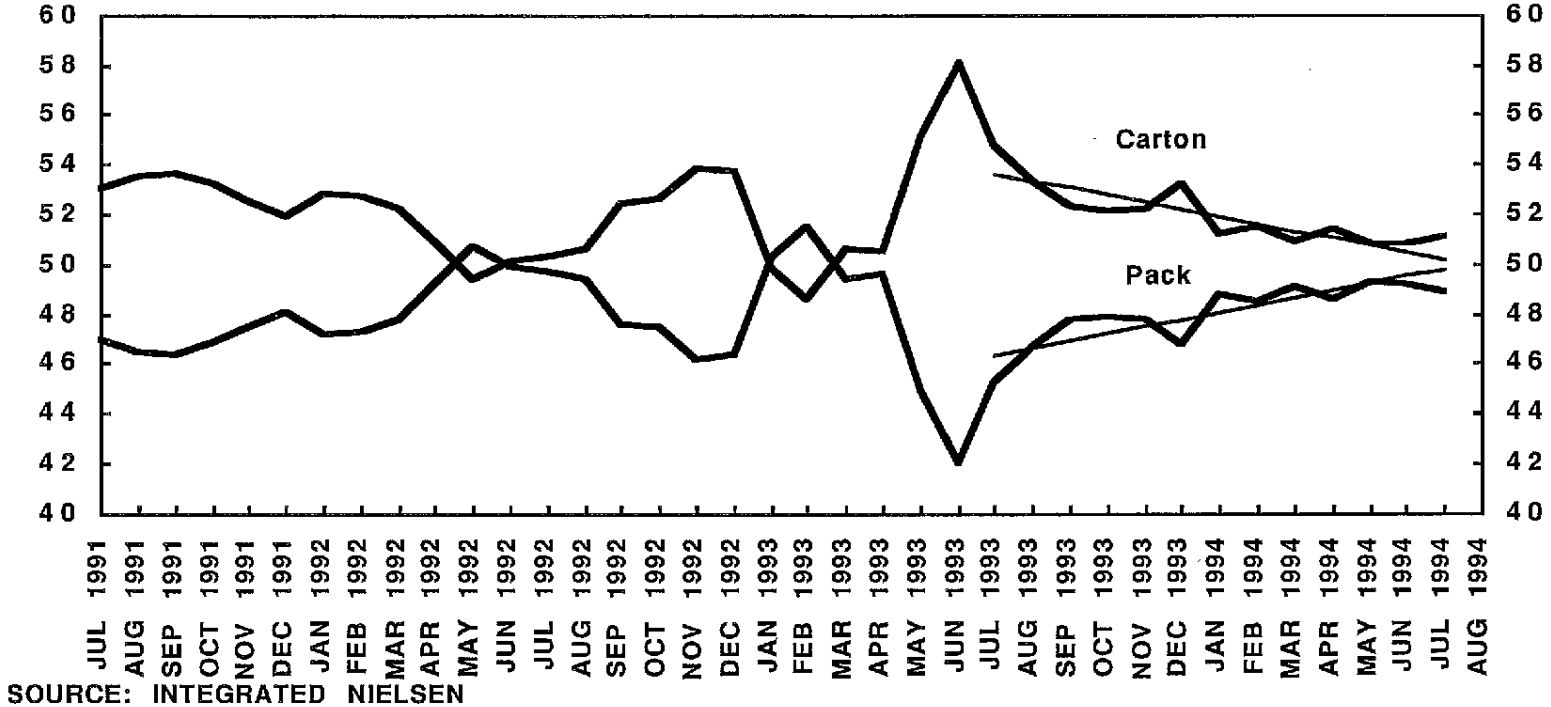
2073610355

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

MARLBORO'S PACK CONTRIBUTION IN SUPERMARKETS IS STEADILY INCREASING.

TOTAL MARLBORO
PACK/CARTON % CONTRIBUTION
SUPERMARKETS



SOURCE: INTEGRATED NIELSEN

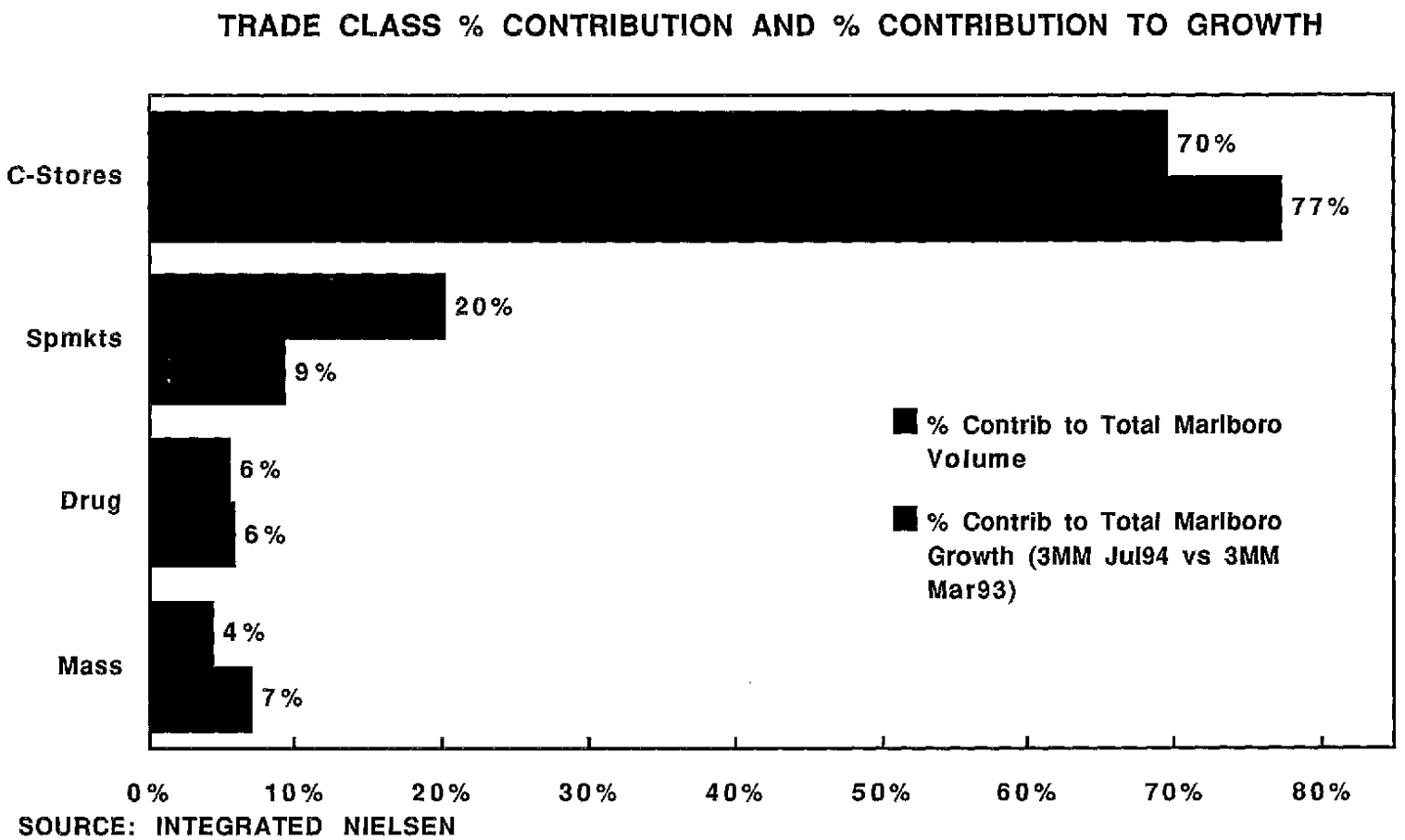
2073610356

MRL_PK/CT_CONTR.CHT/RKH

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

CONVENIENCE STORES CONTRIBUTED 77% TO MARLBORO'S POST MLP GROWTH.



SOURCE: INTEGRATED NIELSEN

TC_CNTRMRL.CHT/RKH

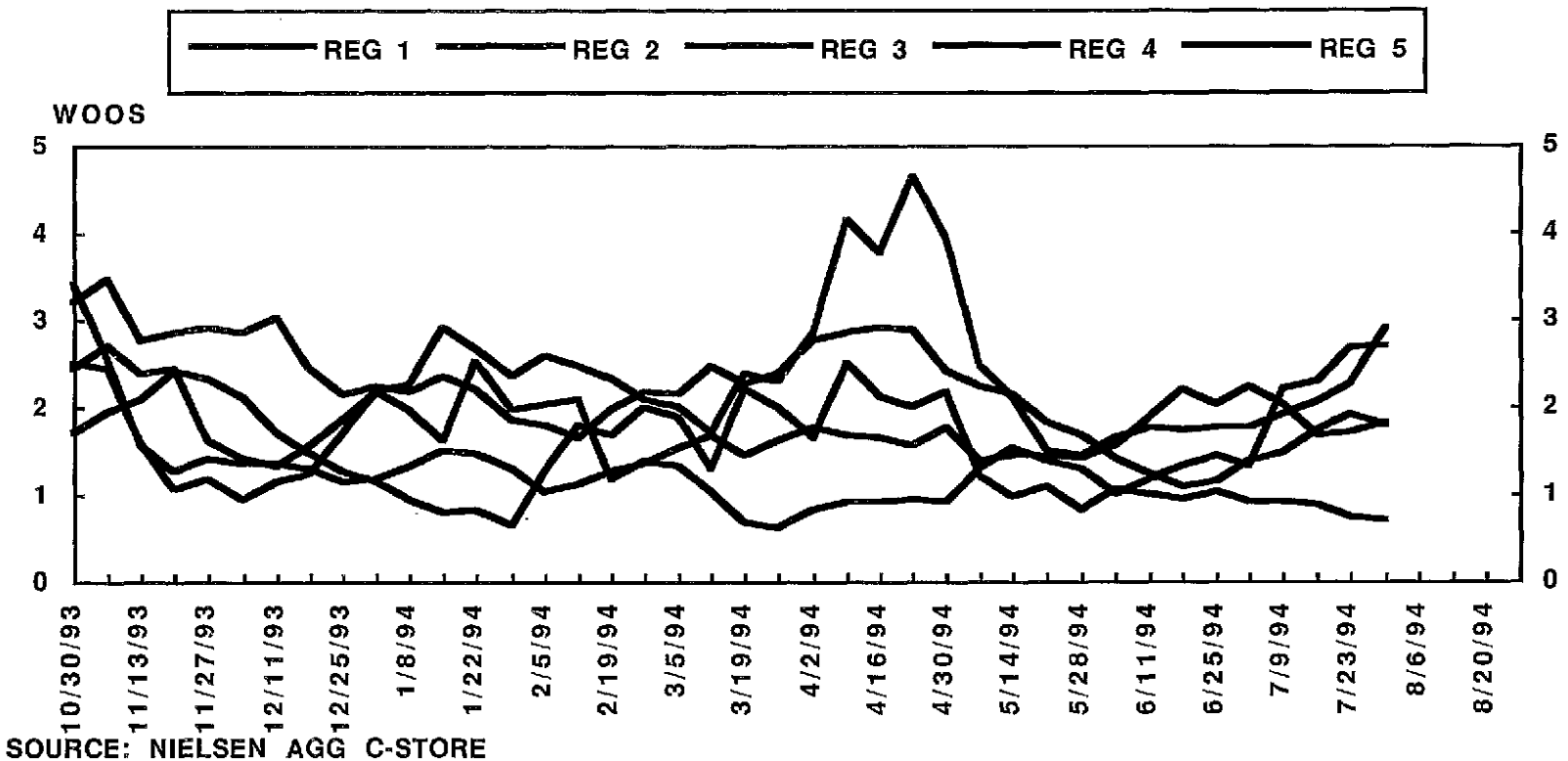
2073610357

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

MARLBORO OUT OF STOCK BY REGION

TOTAL MARLBORO
4WM WEIGHTED OUT OF STOCK BY REGION



SOURCE: NIELSEN AGG C-STORE

OOS_MRL.CHT/RKH

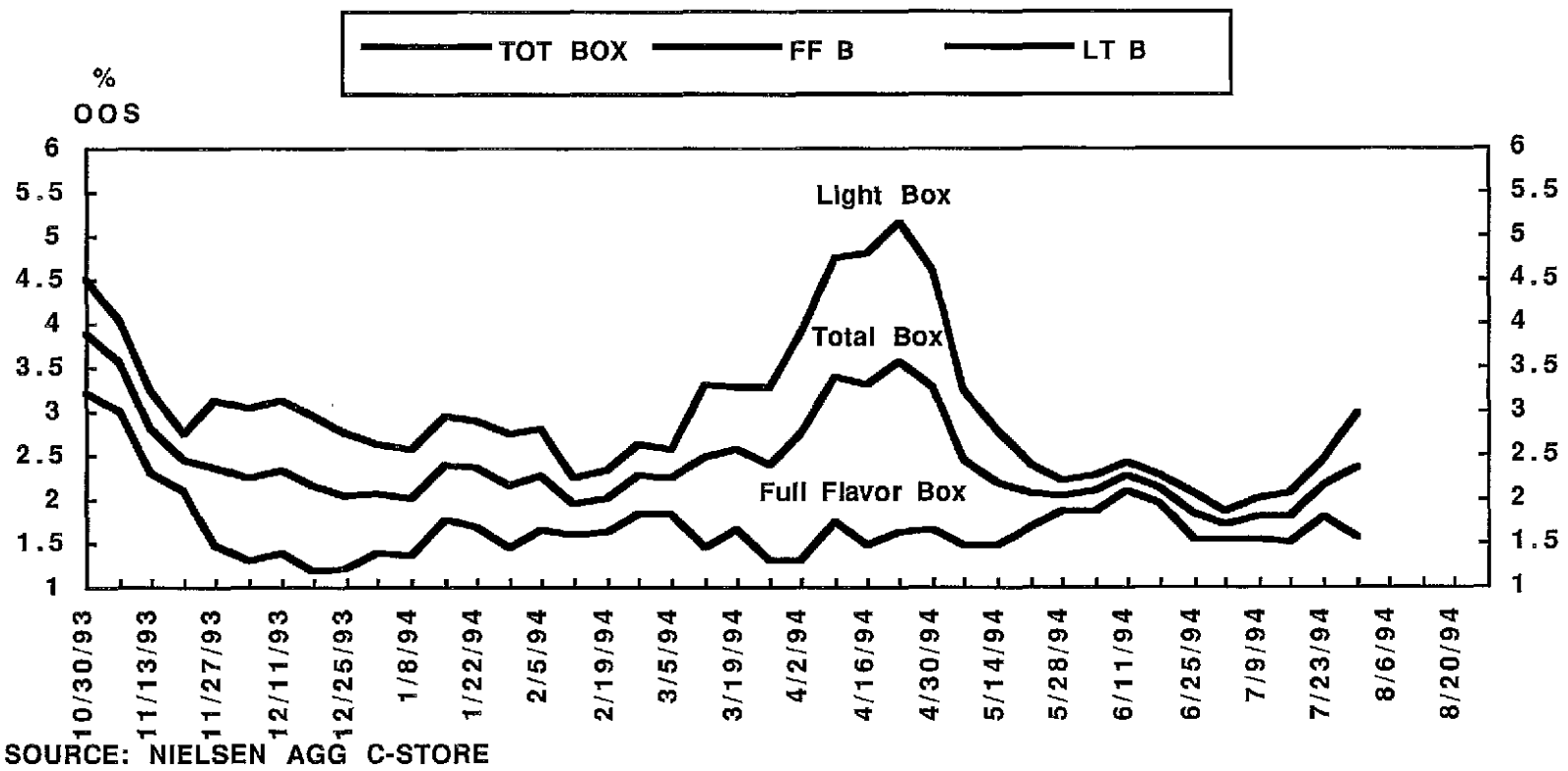
2073610358

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

MARLBORO BOX OUT OF STOCK

TOTAL MARLBORO
4WM OUT OF STOCK
BY BOX SEGMENT



SOURCE: NIELSEN AGG C-STORE

MRLB_OOS.CHT/RKH

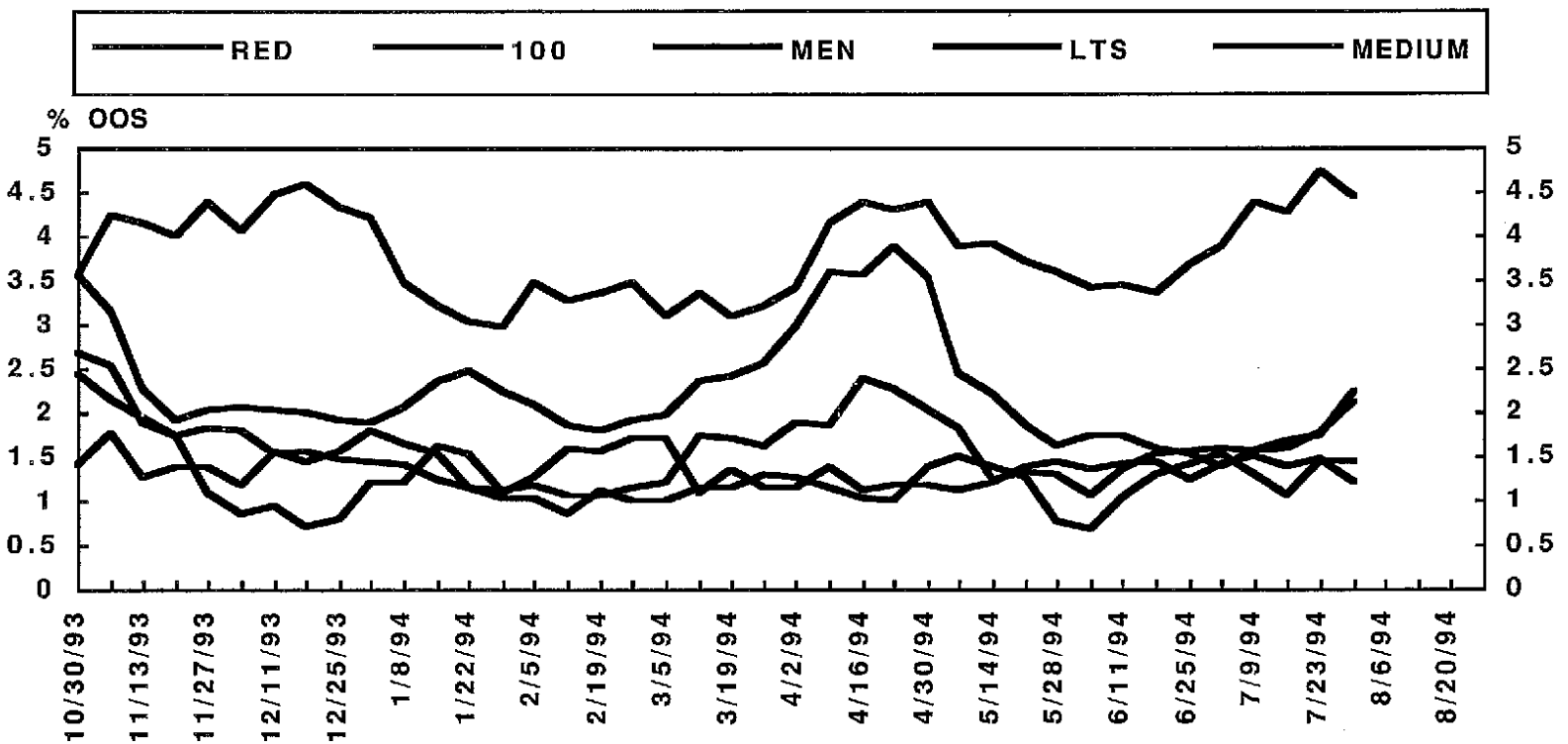
2073610359

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO BRAND AUDIT

MARLBORO OUT OF STOCK BY SEGMENT

TOTAL MARLBORO
OUT OF STOCK
BY SEGMENT



SOURCE: NIELSEN AGG C-STORE

NOTE: NIELSEN DOES NOT INCLUDE MARLBORO B1G1F IN ANY OF THE SEGMENTS

MRL_OOS_SEG.CHT/RKH

2073610360

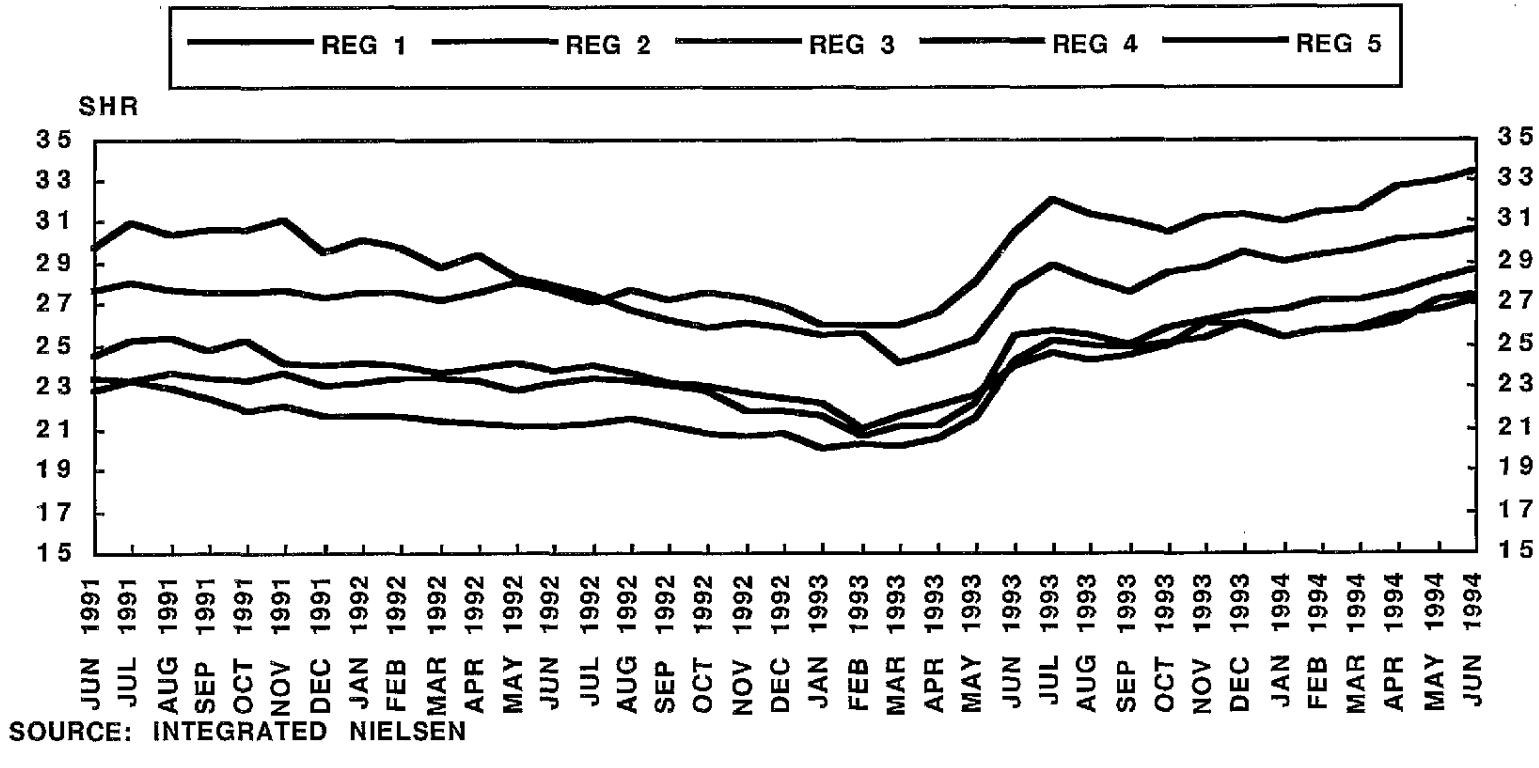
Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

All regions/sections are exhibiting positive share growth.

- Region 1 strongest, Region 5 weakest
- All sections showing growth

TOTAL MARLBORO
SHARE OF MARKET
BY REGION



SOURCE: INTEGRATED NIELSEN

MRL_REG.CHT/RKH

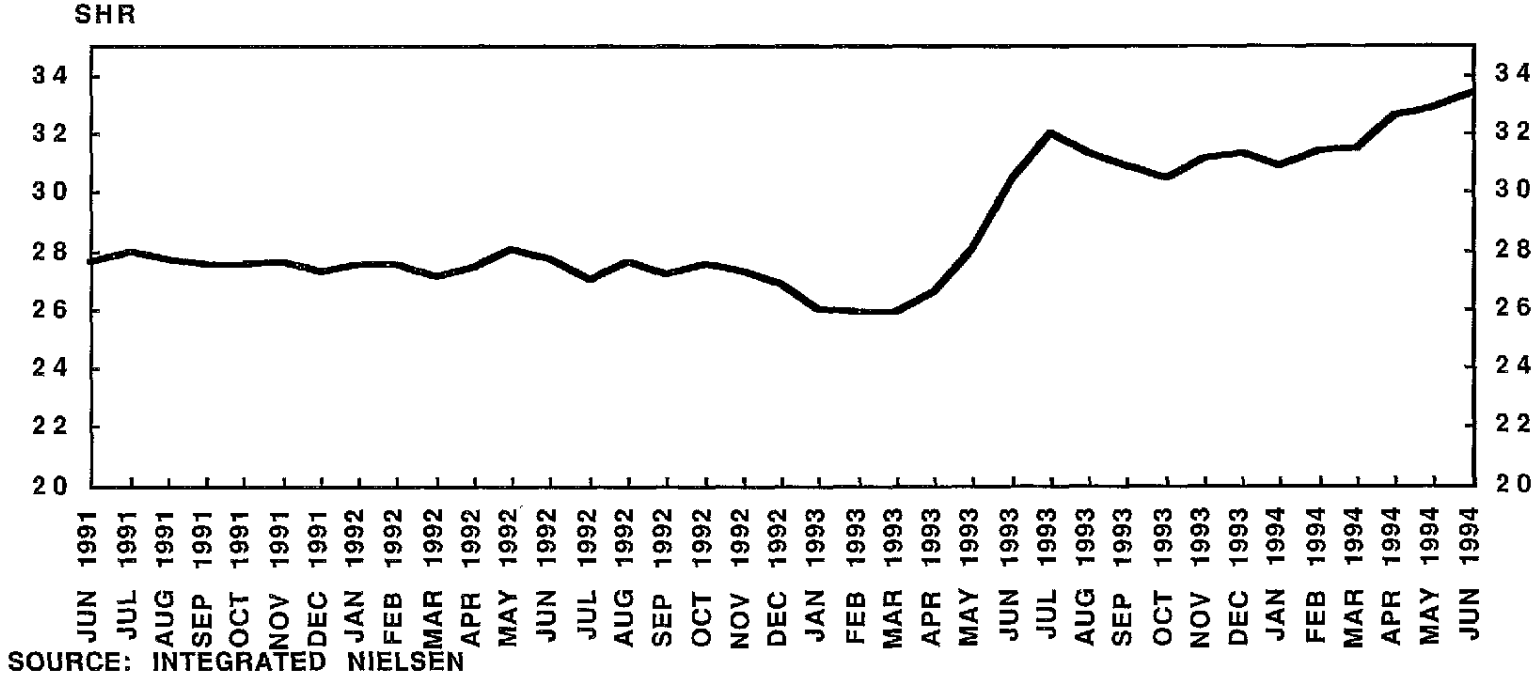
2073610361

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARLBORO SHARE IN REGION 1

TOTAL MARLBORO
SHARE OF MARKET
REGION 1



SOURCE: INTEGRATED NIELSEN

MRL_REG1.CHT/RKH

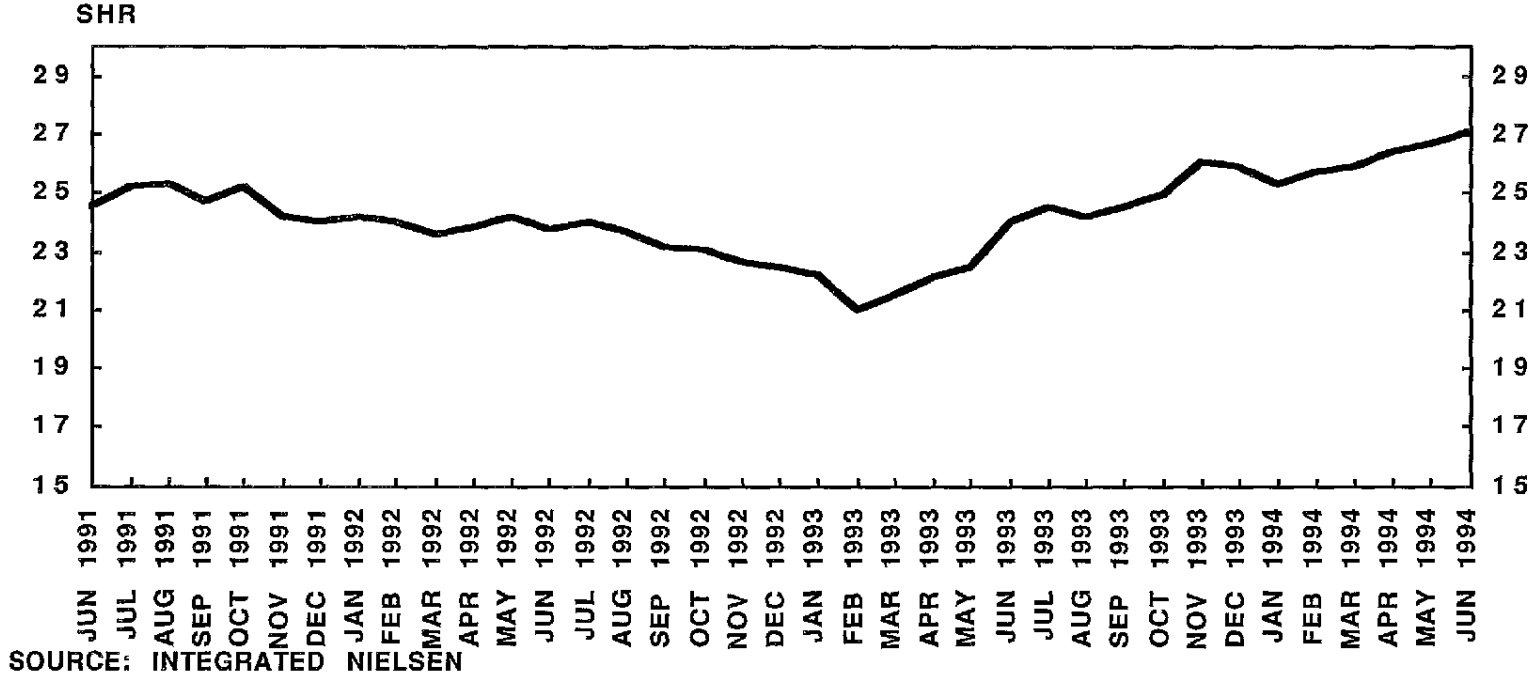
2073610362

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARLBORO SHARE IN REGION 2

TOTAL MARLBORO
SHARE OF MARKET
REGION 2



SOURCE: INTEGRATED NIELSEN

MRL_REG2.CHT/RKH

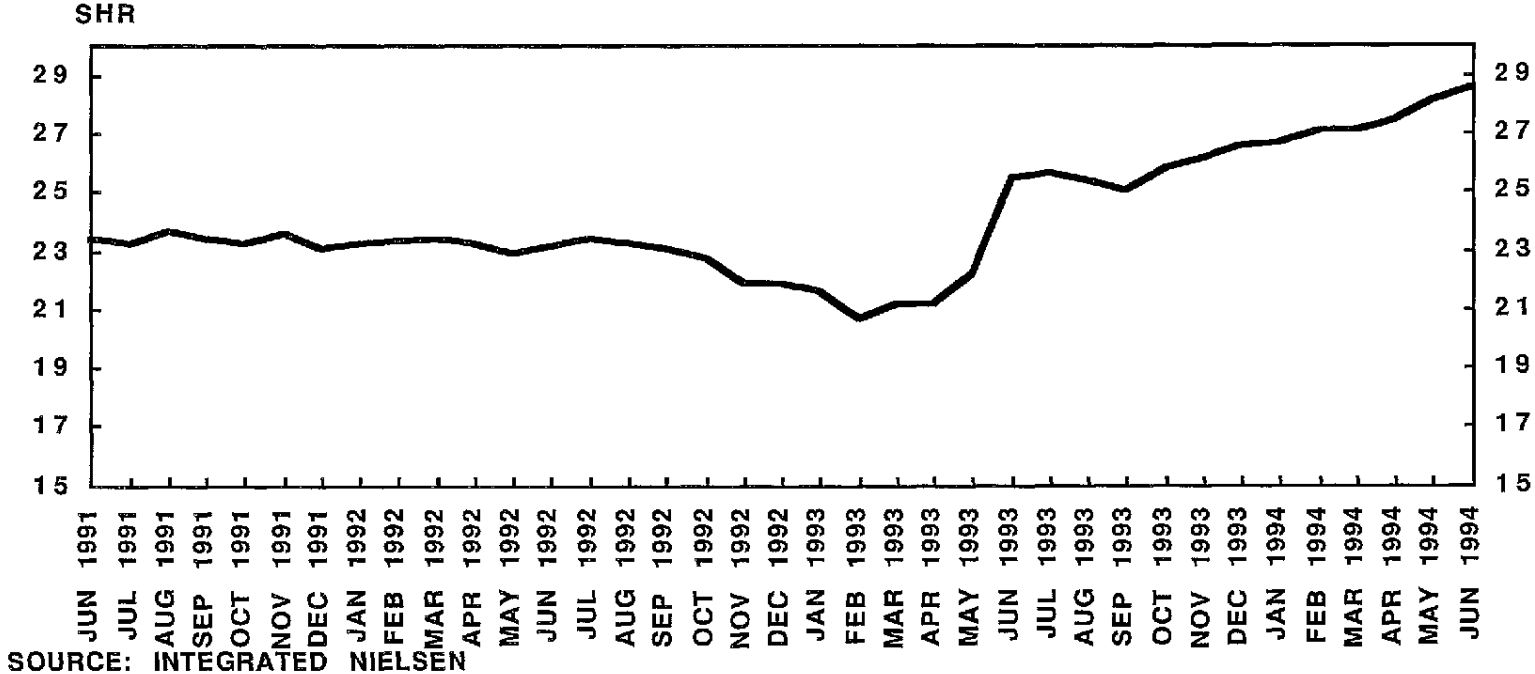
2073610363

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARLBORO SHARE IN REGION 3

TOTAL MARLBORO
SHARE OF MARKET
REGION 3



SOURCE: INTEGRATED NIELSEN

MRL_REG3.CHT/RKH

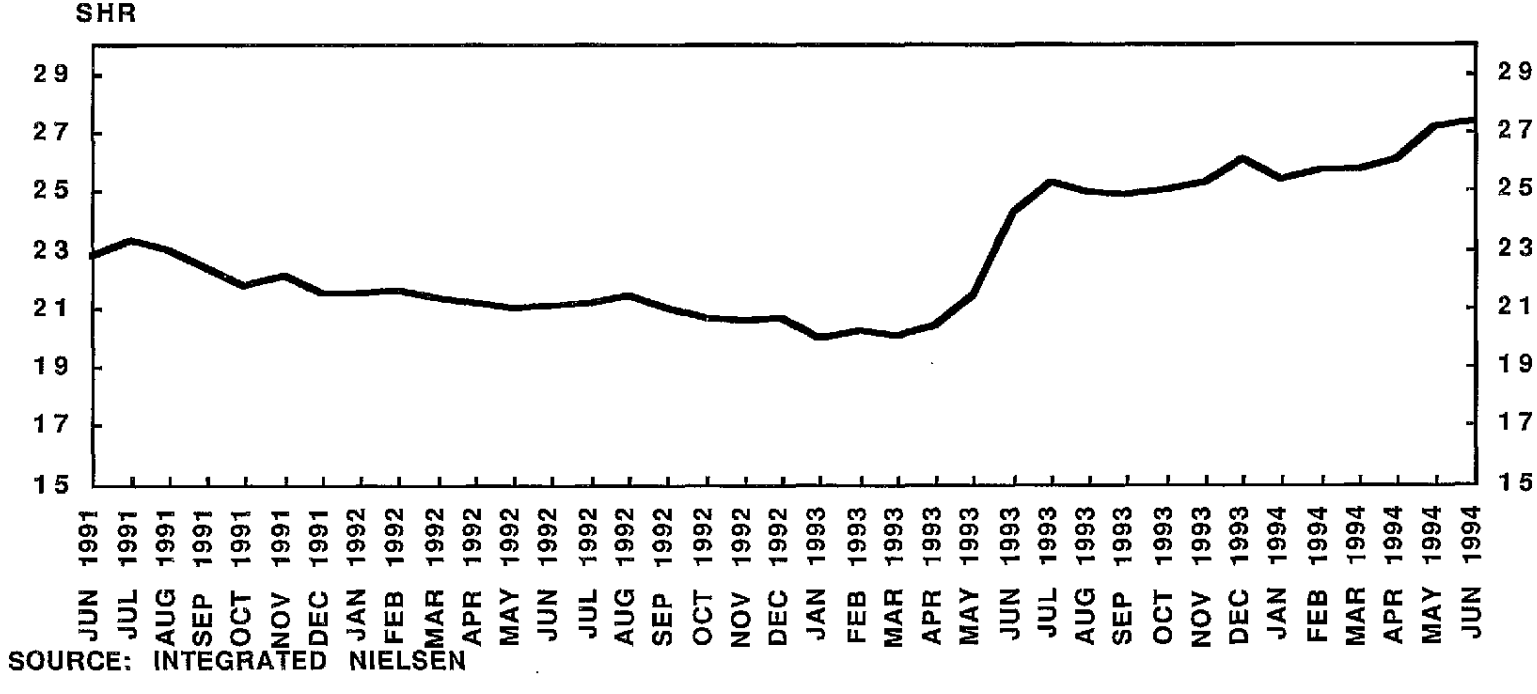
2073610364

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARLBORO SHARE IN REGION 4

TOTAL MARLBORO
SHARE OF MARKET
REGION 4



SOURCE: INTEGRATED NIELSEN

MRL_REG4.CHT/RKH

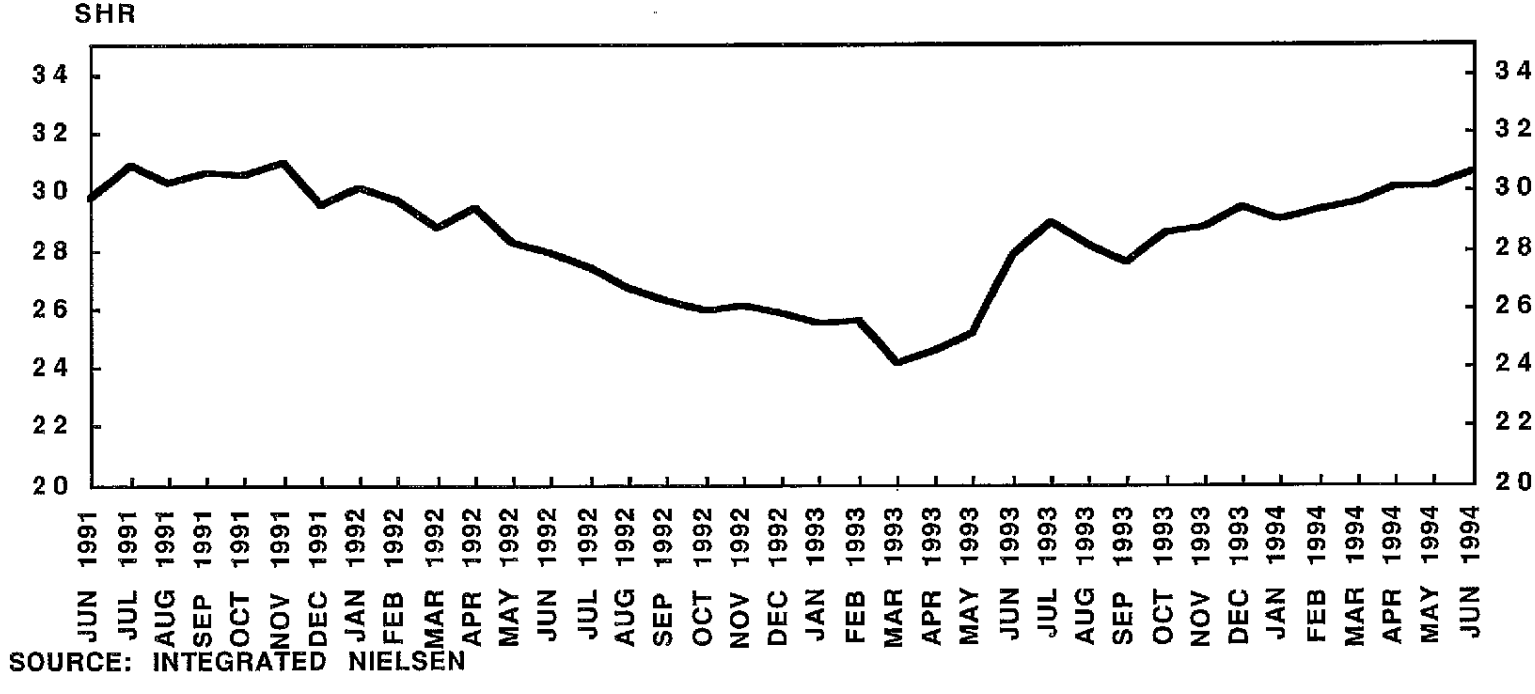
2073610365

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARLBORO SHARE IN REGION 5

TOTAL MARLBORO
SHARE OF MARKET
REGION 5



SOURCE: INTEGRATED NIELSEN

MRL_REG5.CHT/RKH

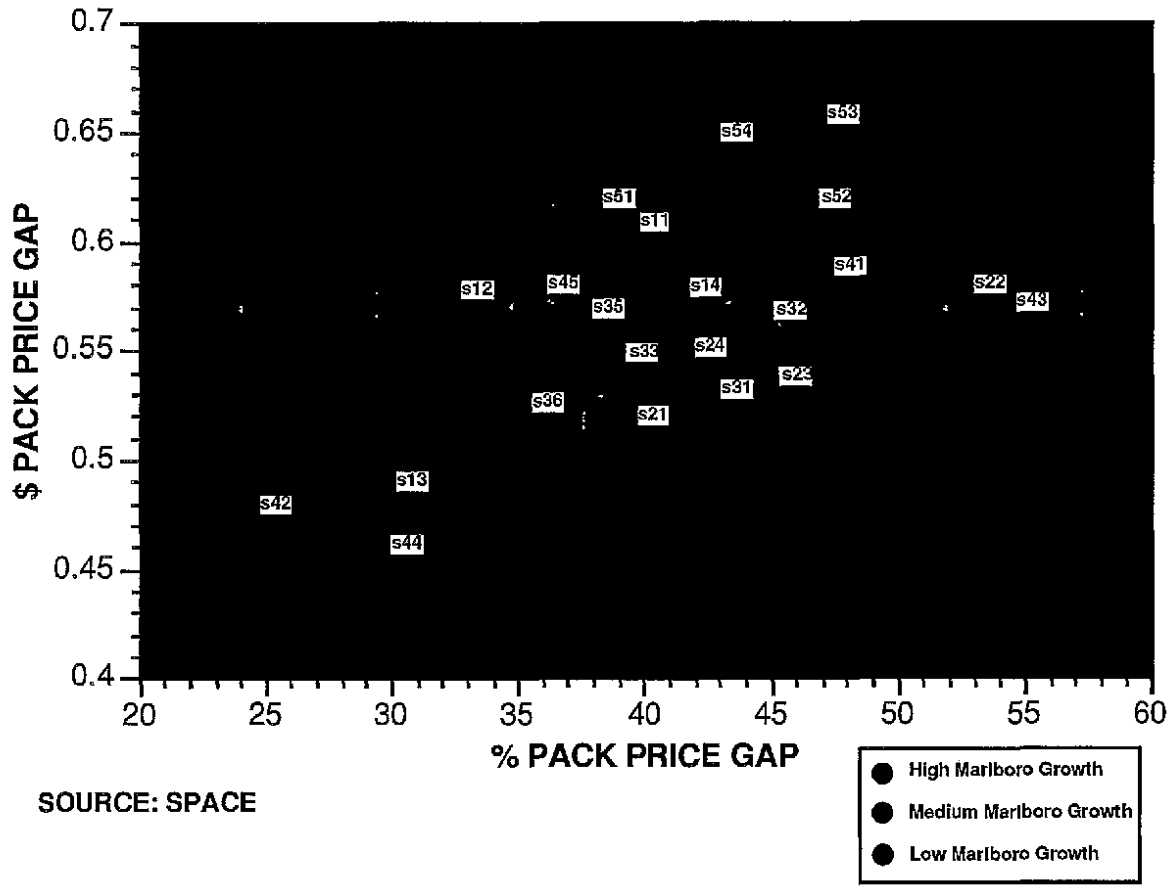
2073610366

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MOST OF THE HIGH MARLBORO GROWTH SECTIONS HAVE MODERATE TO LOW % PACK PRICE GAPS.

TOTAL MARLBORO
$ PACK GAP VS % PACK GAP
BY SECTION



SOURCE: SPACE

SP_GAP.DLT-1/RKH

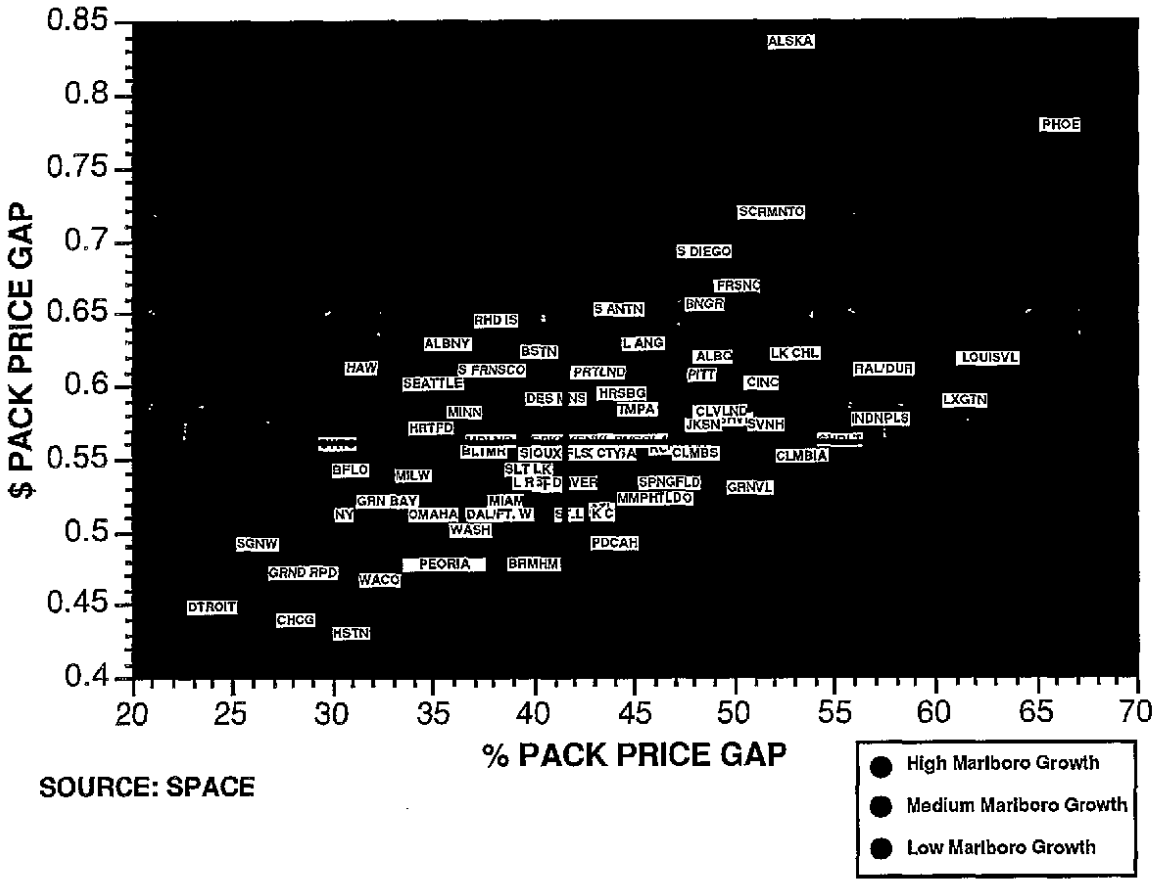
2073610367

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO

MARKETS SHOW A SIMILAR PATTERN.

TOTAL MARLBORO $ PACK GAP VS % PACK GAP BY MARKET



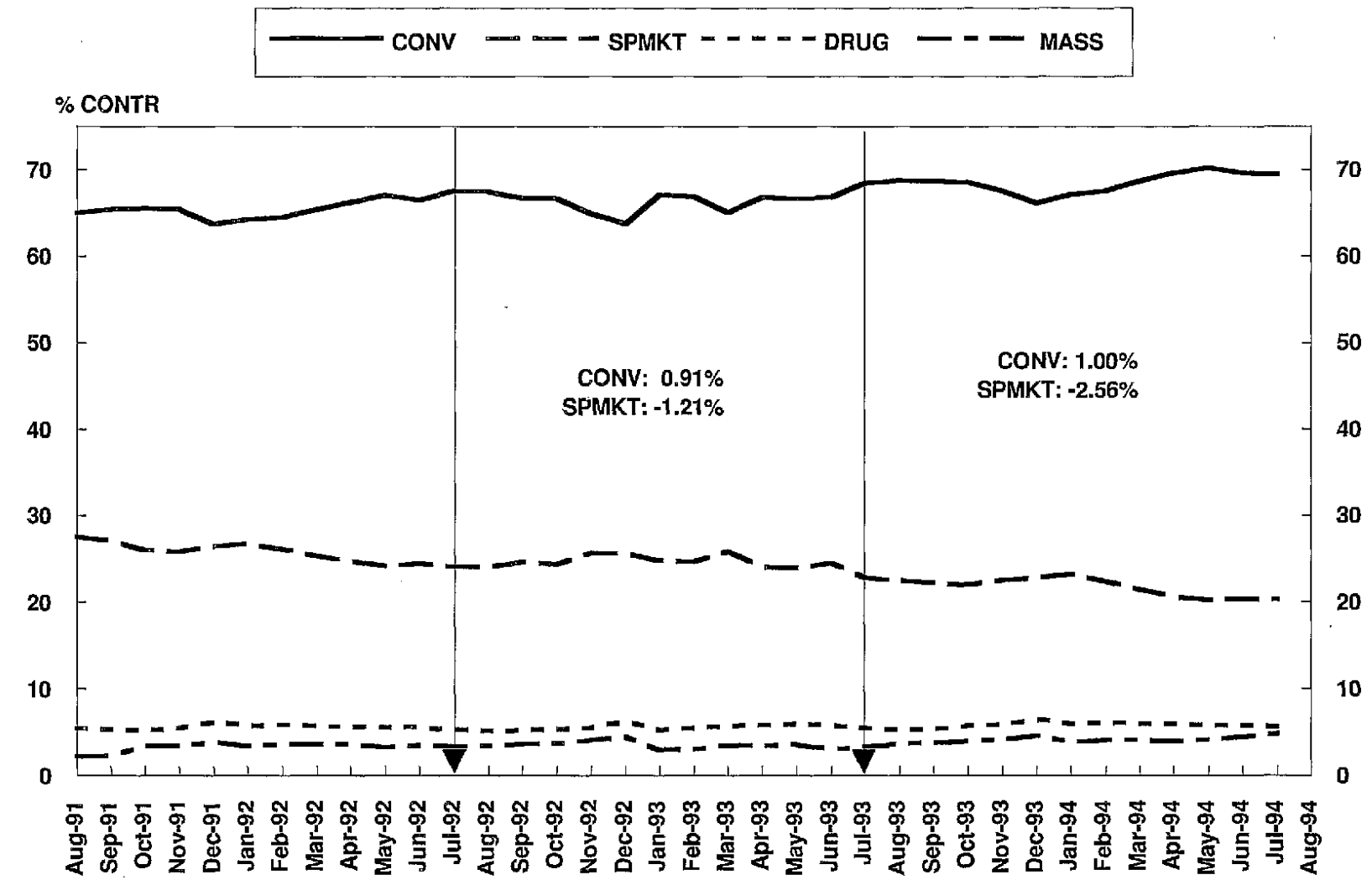
SOURCE: SPACE

SP_GAP.DLT-2/RKH

2073610368

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO TRADE CLASS SHIFTING
% VOLUME CONTRIBUTION TO U.S. BY TRADE CLASS



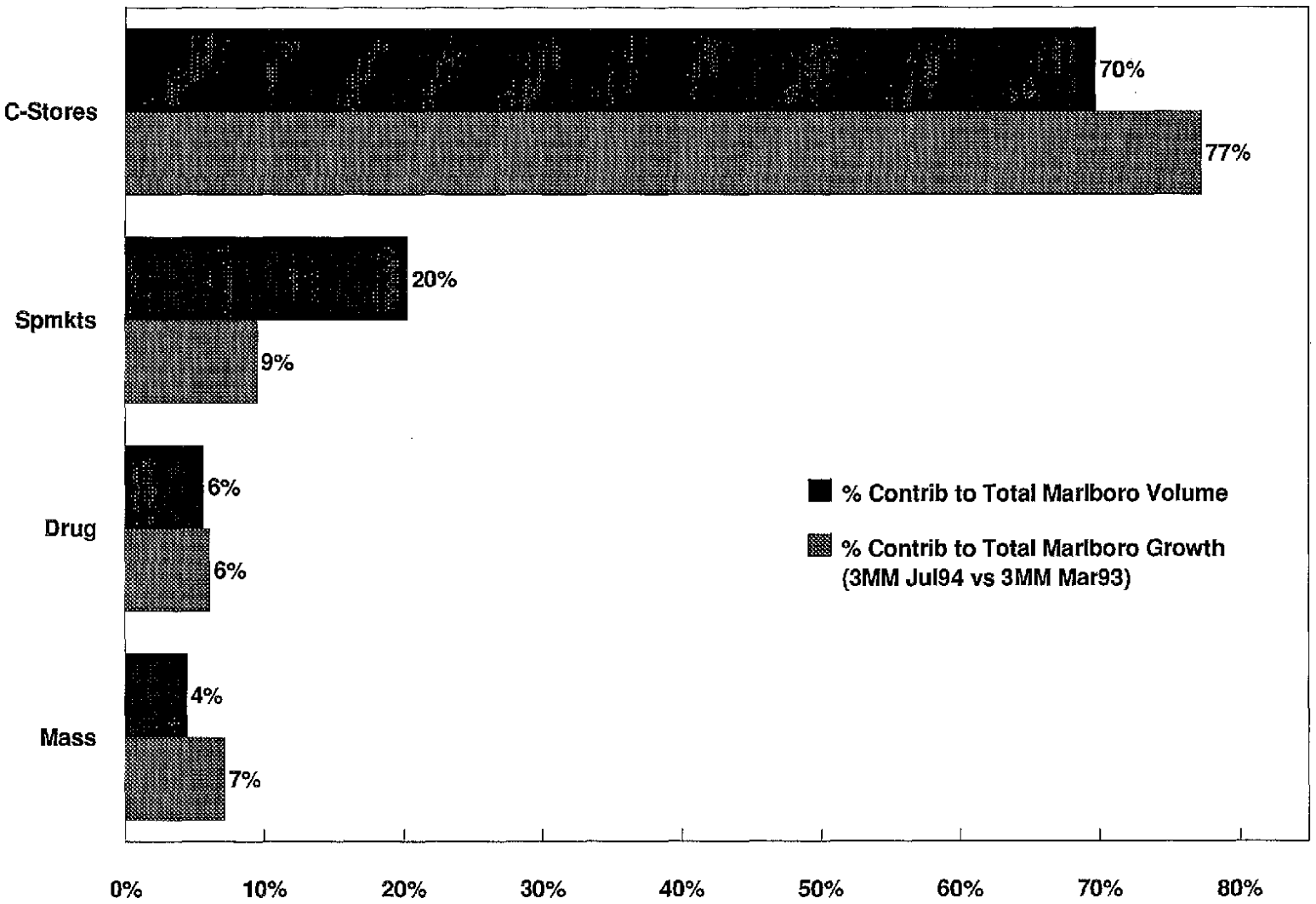
SOURCE: INTEGRATED NIELSEN

TCMRL_SHIFT.CHT

2073610369

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

TRADE CLASS % CONTRIBUTION AND % CONTRIBUTION TO GROWTH



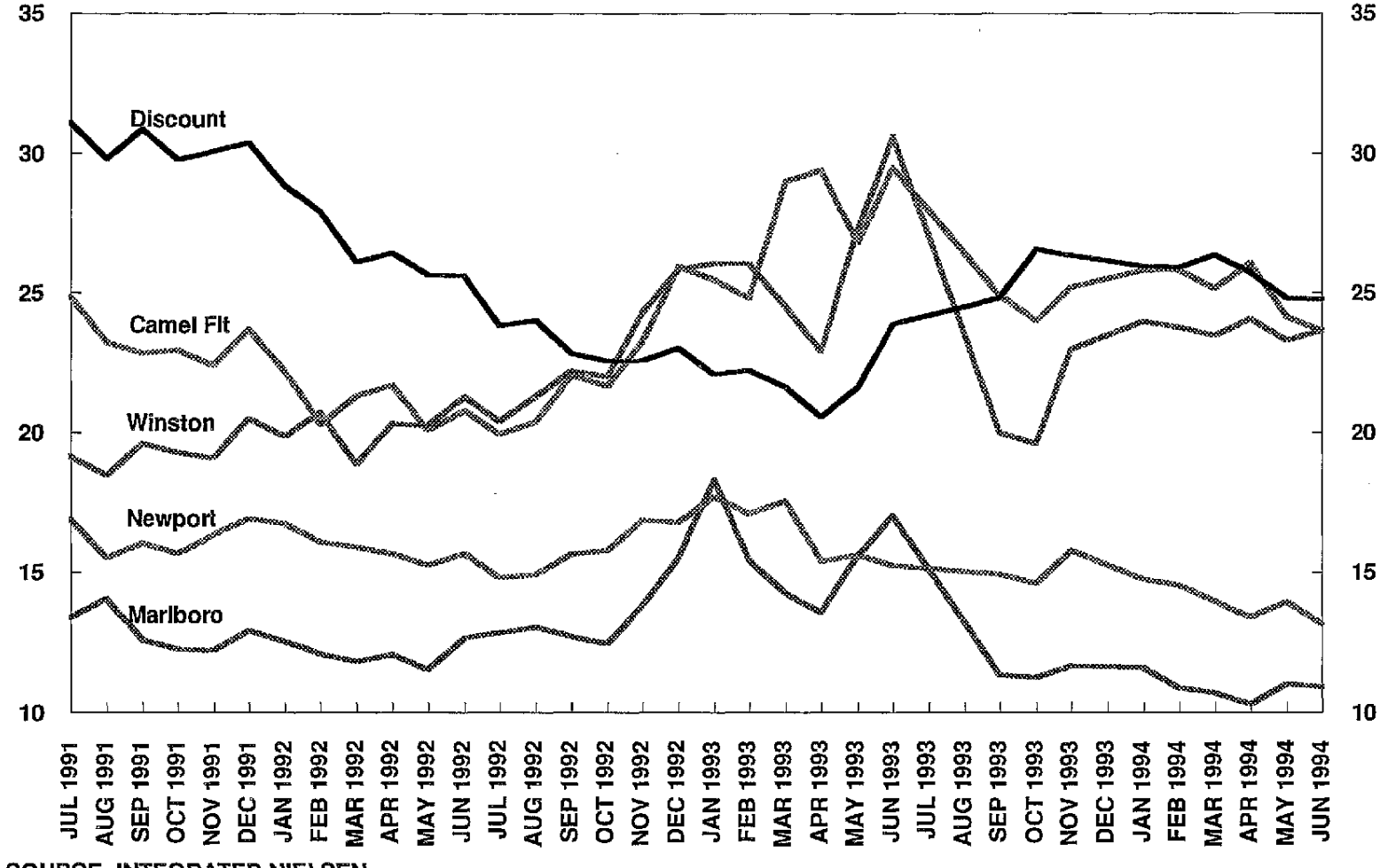
SOURCE: INTEGRATED NIELSEN

tc_cntrmrl.cht

2073610370

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

TOP BRANDS
DAYS SUPPLY



SOURCE: INTEGRATED NIELSEN

TDS_COMP.CHT

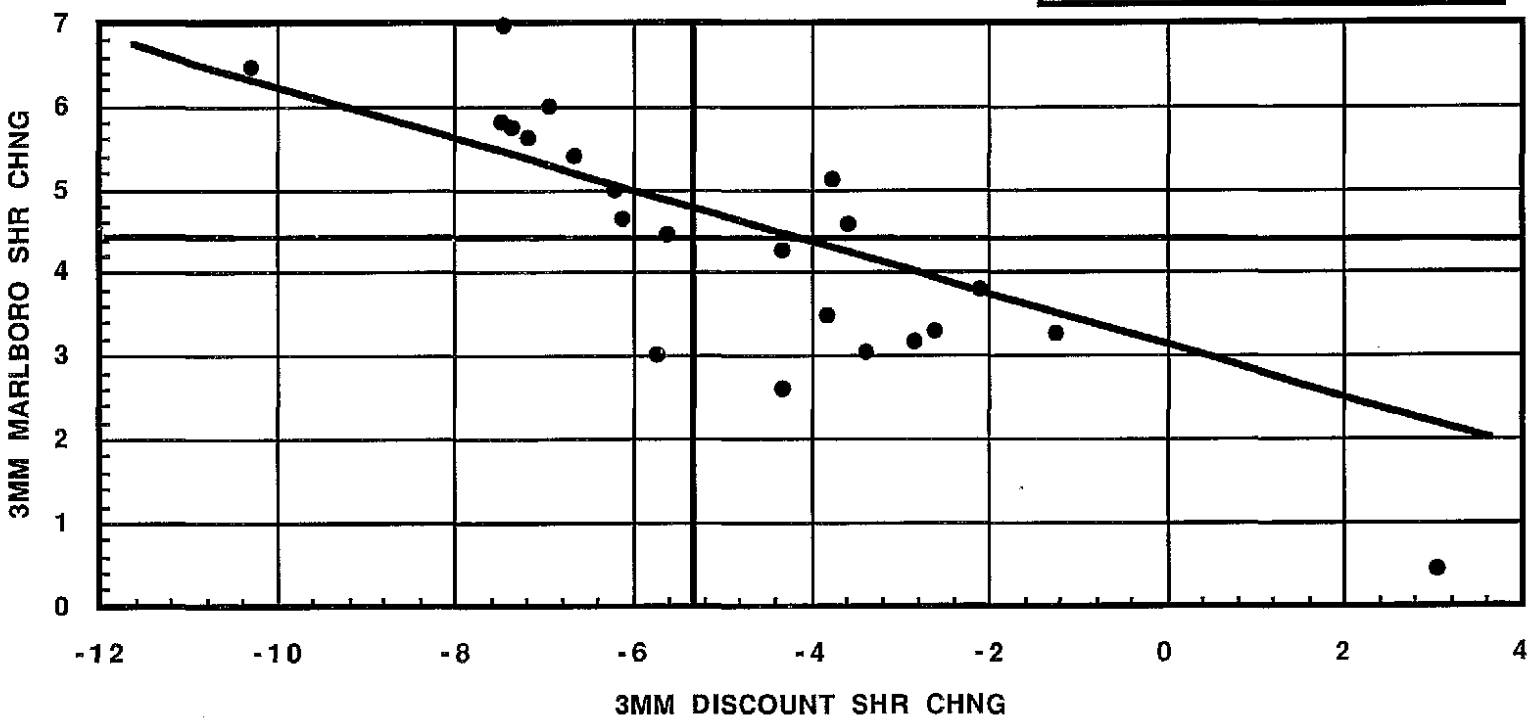
2073610371

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004

MARLBORO vs. DISCOUNT SHARE CHANGE vs. YEAR AGO BY SECTION

CORRELATION = -.9

INTERACTION COEFFICIENT = -1.35



SOURCE: INTEGRATED NIELSEN - 3MM JUNE 1994 VS. YEAR AGO

scatter_trendYR.cht/LLH

2073610372

Source: https://www.industrydocuments.ucsf.edu/docs/jgdm0004